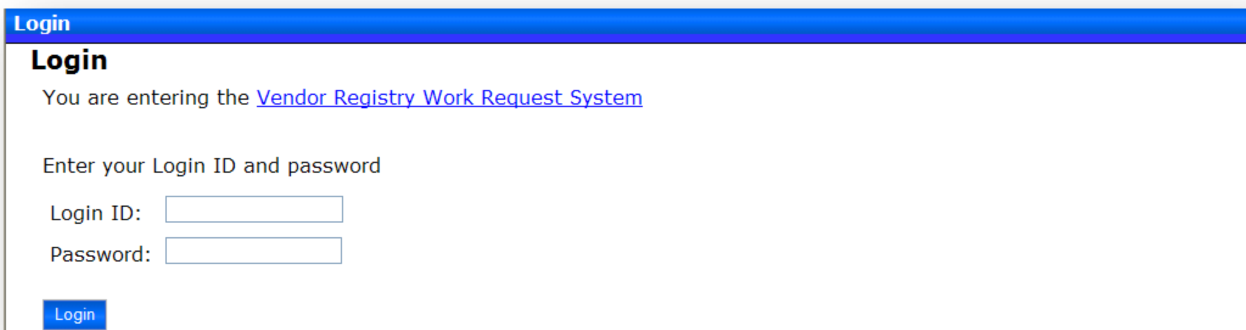
VENDOR REGISTRY WORK REQUEST SYSTEM

This work request system has been created to replace the spovendors@nd.gov email account.

This system will provide agency users:

- A single point of contact to enter all work requests to Vendor Registry (vendor maintenance, vendor creation, worklist clean up, 1099 corrections, purchase order corrections, purchase order creation, etc.)
- The ability to see the status of their requests.
- The ability to download a listing of their agency's requests.
- The ability to look up past requests.
- Notification once the request has been completed.

The system can be accessed at https://secure.intranetapps.nd.gov/omb/vr/vwrs/login.htm or through the Vendor Registry web site http://www.nd.gov/vr/. Look for the link called "Vendor Registry Work Request System."



Agencies will need to request a user to be set up with access to the Work Request System. Once set up the user will be able to access the system by using their NDGOV ID and password.

VENDOR REGISTRY WORK REQUEST SYSTEM

Once your agency has submitted a few requests, it may look like this:

Main Menu

Vendor Registry Requests

Vendor Requests
Non-vendor Requests
Search Requests

Pending Requests for 325 - Dept. of Human Services

Request #	Request Type	Requester Name	Status	Status Date	Priority	Assigned To	Email	Telephone	Action
10882	Vendor	Kerry Bailey	In Progress	04/30/2012 09:31	High	Renee Walery	rwalery@nd.gov	(701) 328-1729	View
10903	Vendor	Kerry Bailey	In Progress	04/27/2012 14:20	High	Renee Walery	rwalery@nd.gov	(701) 328-1729	View
27497	Vendor	Kerry Bailey	In Progress	04/27/2012 14:34	High	Melvin Faris	mfaris@nd.gov		View
27841	Vendor	Kerry Bailey	In Progress	03/20/2012 12:47	High	Renee Walery	rwalery@nd.gov	(701) 328-1729	View
27982	Vendor	Kerry Bailey	Returned	02/28/2012 14:09	High				View
27983	Other	Kerry Bailey	Returned	03/20/2012 12:46	High				View
28001	Vendor	Kerry Bailey	In Progress	12/14/2011 08:59	High	Melvin Faris	mfaris@nd.gov		View
28043	Vendor	Kerry Bailey	Returned	12/23/2011 11:36	High				View
28101	Vendor	Kerry Bailey	In Progress	03/22/2012 09:56	High				View

The first portion allows you to submit your requests and search for existing requests:

Main Menu | User: Kerry Bailey | Logout

Main Menu

Vendor Registry Requests

Add Vendor Request
Add General Request
Search Requests

The second portion of the 'Main Menu' is a listing of your agency's pending requests:

Pending Requests for 325 - Dept. of Human Services

Request #	Request Type	Requester Name	Status	Status Date	Priority	Assigned To	Email	Telephone	Action
27497	Vendor	Kerry Bailey	In Progress	08/10/2011 10:00	High	Melvin Faris	mfaris@nd.gov		View
27462	Vendor	Kerry Bailey	In Progress	07/26/2011 07:55		Pam Schonert	pjschonert@nd.gov	(701) 328-2773	View
27462	Vendor	Kerry Bailey	In Progress	07/26/2011 07:55		Pam Schonert	pjschonert@nd.gov	(701) 328-2773	View
27492	Vendor	Kerry Bailey	In Progress	07/13/2011 14:12		Pam Schonert	pjschonert@nd.gov	(701) 328-2773	View
27492	Vendor	Kerry Bailey	In Progress	07/13/2011 14:12		Pam Schonert	pjschonert@nd.gov	(701) 328-2773	View
27701	Vendor	Kerry Bailey	In Progress	09/16/2011 08:56		Renee Walery	rwalery@nd.gov	(701) 328-1729	View

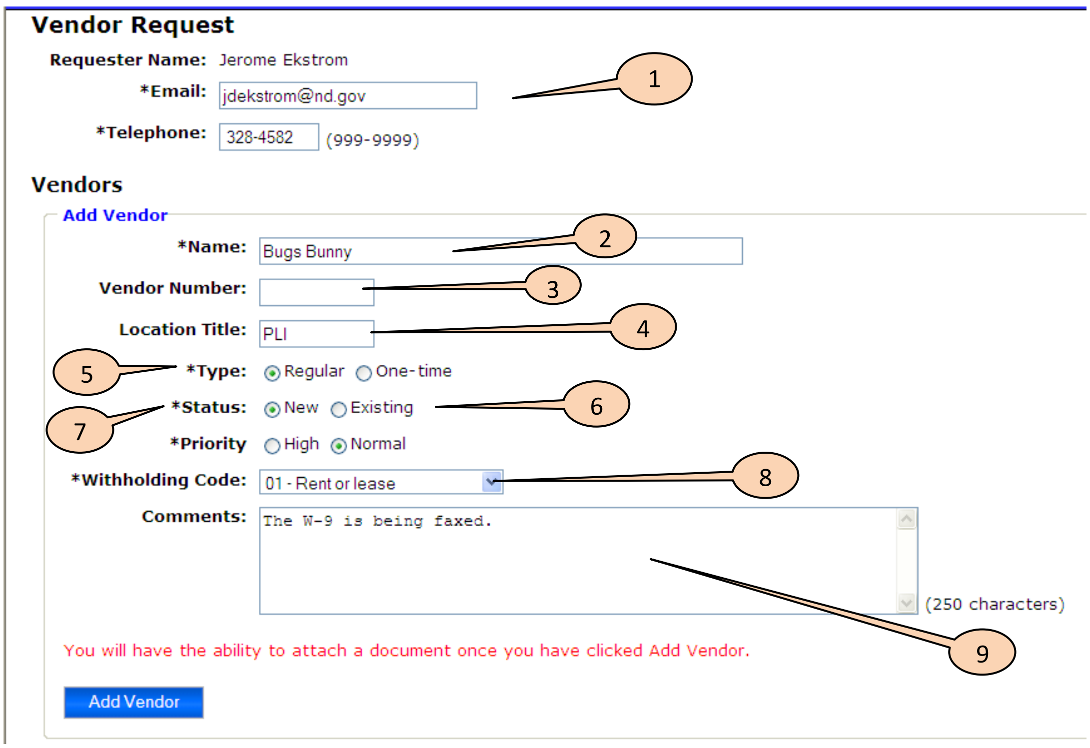
To submit requests, select the appropriate type of request: Vendor or Non-vendor.

- Vendor Requests – this includes all types of vendor additions or changes, including information on how to find a particular vendor.
- Non-vendor Requests – this includes purchase order, requisition, and 1099 requests or any questions related to the Vendor Registry office.

NOTE: If your question regards changing a vendor for proper 1099 reporting, feel free to enter that as a 1099 request. Otherwise, ALL situations involving a vendor should be submitted as a Vendor Request.

Vendor Requests

The first screen of the vendor work request is below:



This screen allows you to add the information needed to either create a new vendor <u>or update an existing vendor</u>. Do not be afraid to use this screen to ask questions about vendors already in the database.

1. Your name, email address, and telephone number should appear at the top based upon your login. If you should be contacted by a different phone number or email account, please feel free to change this information.
2. ***Name** – Enter the vendor's name; this is required even if there is an attachment.
3. **Vendor Number** –optional – New vendors will not have a number until Vendor Registry enters it into PeopleSoft. However, please enter the vendor number if you have a specific vendor in mind to be updated. This helps us find the correct vendor for your change.
4. **Location Title** – optional – Enter information here if you would like a specific location set up for your agency (i.e. PLI, CBDG, 1099-G, 1099-S, CARS…., etc.), or if you want a particular location changed.
5. ***Type** – required – Indicate whether this is a one-time payment or regular vendor. If you select "One-time," you will be required to enter the dollar amount of the payment as well. This helps us determine whether or not paperwork is required for this vendor.

6. ***Status** – required – Indicate whether this is a new vendor or an existing one that needs changes.
7. ***Priority** – required – Indicate the urgency of this work request. Overuse of selecting "High" will be treated like the boy who cried wolf – we will ignore that label and work on it in order in which all requests come in.
8. ***Withholding Code** – required – Select the withholding code appropriate for the payments made to this vendor. If you do not know, or the payment is nonreportable, select "N/A."
    a. If you know that your payment will be a rent or lease payment as shown in the example on the previous page, or if you need the withholding class of 03 for a grant or prize, this is your chance to give us that information. Vendor Registry will most likely set up class 07 as the default for a regular location, but we will also set up other classes upon request here. If you don't enter anything in this field, we will assume that you only need class 07.
9. **Comments** – You may enter the vendor's address here for a one-time payment or any other necessary information for the vendor to be set up or changed for your needs. See the following instructions on when to enter an address here or not:
    1. If your request is accompanied by a W-9 or vendor application, there is no need to type the address in the Comment box, as long as the remit address you need is the same as the one on the vendor form.
    2. If you need to send your payments to an address other than what is on the W-9 or vendor application, enter into the Comments box something similar to this: "Need Remit address to PO Box 555, Nowhere, ND 58001." We will set up both addresses on the vendor that way.
    3. If you are requesting a one-time vendor for a payment under $600, you do not need to submit a W-9. In that case, you must type the address in the Comments box, as that is all we will have to go by.

When the vendor information has been entered, click 

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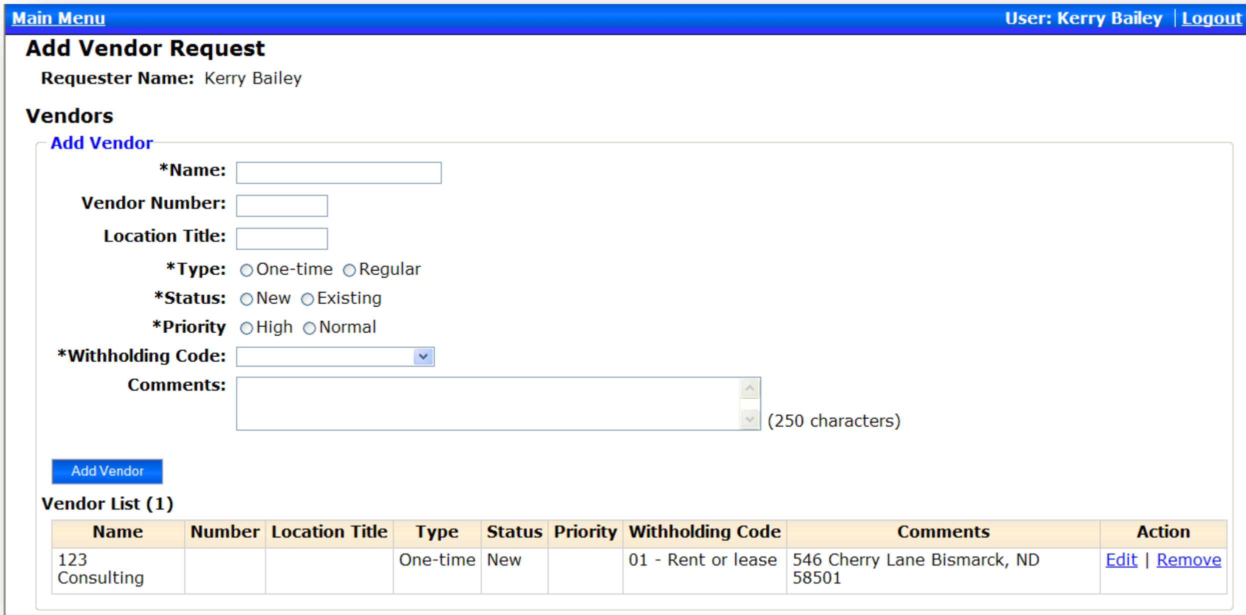
PLEASE NOTE THAT YOU ARE NOT DONE YET. THERE IS AT LEAST ONE MORE STEP BEFORE THIS REQUEST IS SUBMITTED TO VENDOR REGISTRY.

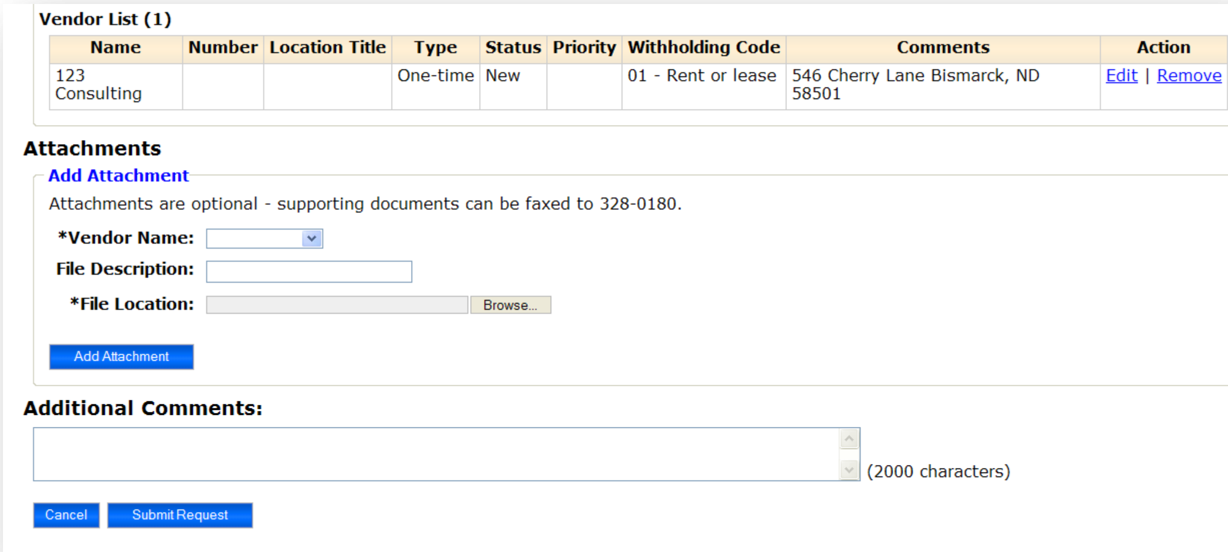
See the next page.



At this point you have the following options:

1. Add another vendor to this request. Scroll to the top of this page and enter the information for a second vendor. Click Add Vendor and continue until all the vendors you need set up or changed are entered. **NOTE**: **If you need more than ten vendors, your request may take 72 hours or more to complete**.
2. Edit the request. Click the ‘Edit’ hyperlink to edit the vendor information you just entered. You made need to do this if you forgot to indicate that a special location is needed or entered the wrong withholding class.
3. Remove the request. If you find that you no longer need this request, it can be removed at this point, but only if there are multiple vendors on this request. If this request only contains the one vendor, simply withdraw your request on the Main Menu.

After clicking Add Vendor for each vendor, a new section appears below where you will be able to attach documents to support your vendor request. See the next page to learn how to attach a pdf with your W-9, vendor application, or invoice. These attachments are optional – you can still fax these documents to 328-0108 - but some agencies prefer to attach their documents to their request.



Attachments

*Vendor Name – select the vendor the attachment should be linked to.

File Description – type the name of the file. This is optional. However, if you are combining multiple vendor documents into one file, you could state "**multiple**" or "**various**" here.

*File Location – select the vendor file from your drives.

Click Add Attachment when you are done.

Additional Comments - Should you have additional comments about the entire work request this is where they are to be entered. This is another place where you can state that the attachment contains paperwork for multiple vendors or that you are faxing the documents to us.

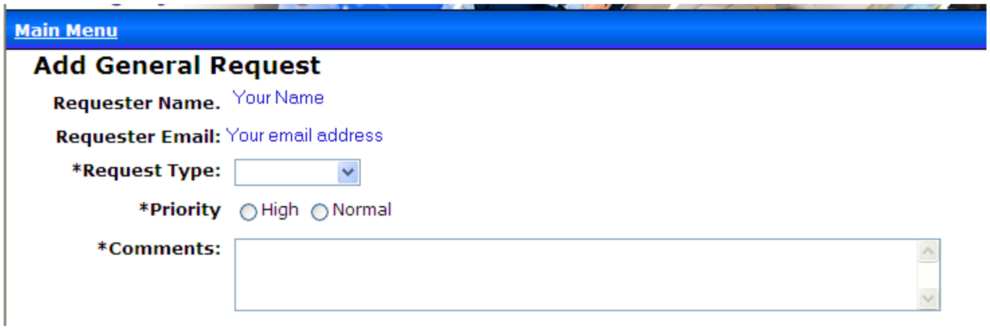
FINAL STEP: Click Submit Request to release the request to Vendor Registry.

Now you are back at your 'Main Menu' where you should see your request listed under the Work Queue with a request number assigned. You still have the ability to edit or cancel your request until someone from Vendor Registry begins to work on it.

Once Vendor Registry has completed your request, you will receive an email notification. If your request contained more than one vendor, the request will not be "complete" until all have been entered by Vendor Registry.

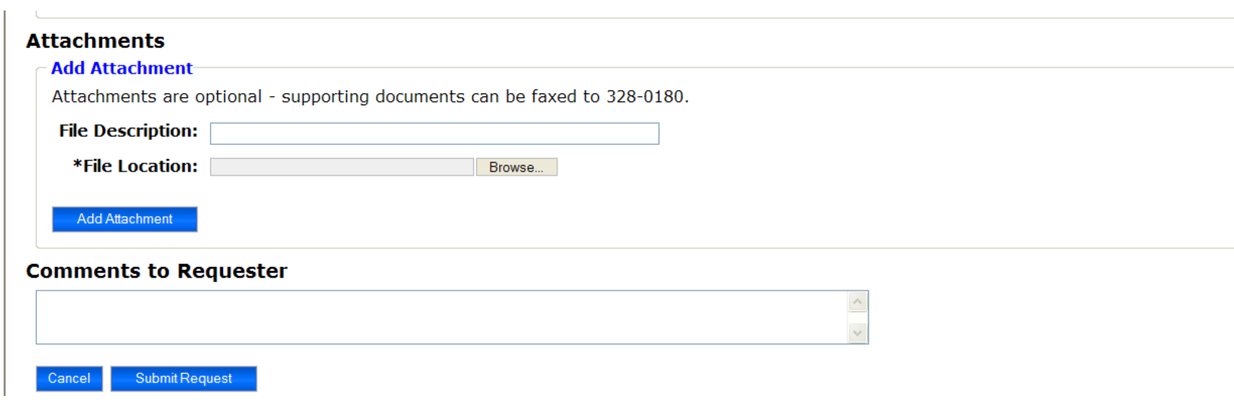
Non-vendor Requests

A Non-Vendor Request follows the same dynamic but these are only to be used for Purchasing or 1099 requests at this time.



The system will automatically provide the name of the Requester and their email address upon logging in. The Requester at this point should enter:

- *Request Type – Purchasing, 1099 or other
- Optional: If a problem exists on a specific purchase order, please enter that number in the request
- *Priority
- *Comments – This section is particularly important in a Non-vendor Request, because this screen can be used for any problem involving the Purchasing or 1099 modules in PeopleSoft. Please be descriptive as to what your question or problem is.



It also allows **Attachments** and provides comments to and from the requester. For instance, if you need help making 1099 corrections, you can attach the spreadsheet here for us to view and bypass any emails sent back and forth.

Submit your request when you are finished. You will receive an email notification once Vendor Registry has completed your request or returned your request for additional information.

Returned Requests

If one of your requests is returned to you from Vendor Registry, you will receive an email notification stating so. The returned request will appear on the Main Menu page like this:

Work Queue

Pending Requests for Beverly A. Haman

Request #	Request Type	Requester Name	Status	Status Date	Priority	Action
83	Vendor	Bev Haman	In Progress	10/03/2011 11:21		View
84	Vendor	Bev Haman	Returned	10/03/2011 11:52		View | Edit | Withdraw

Click the Edit link to see the comments at the bottom of the page as to why your request was returned:

Add Vendor

Vendor List (1)

Name	Number	Location Title	Type	Status	Priority	Withholding Code	Comments	Action
Bevs test			Regular	New		NA - Not Applicable	No address - just testing	Edit | Remove

Attachments

Add Attachment

Attachments are optional - supporting documents can be faxed to 328-0180.

***Vendor Name:**

File Description:

***File Location:** Browse...

Add Attachment

Additional Comments:

(2000 characters)

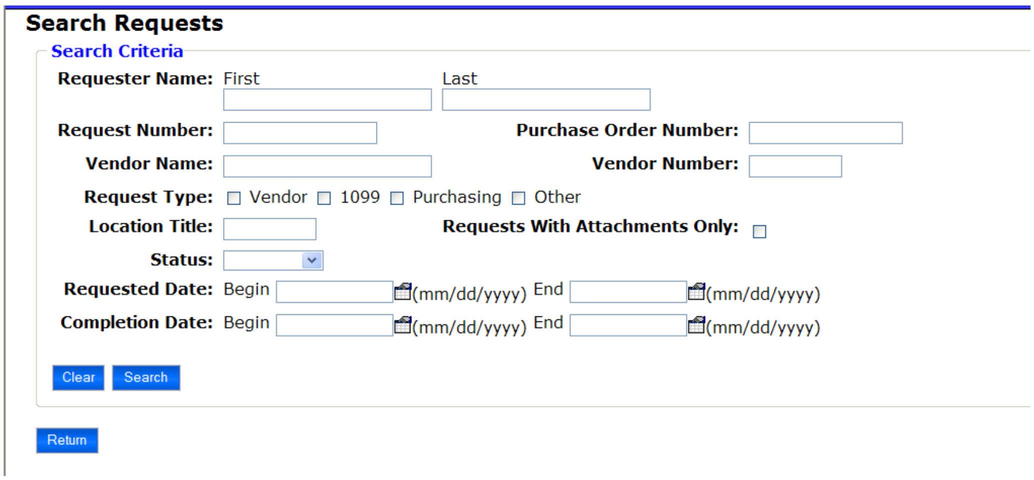
Comments to Requester

Haven't received fax yet - no address for us to input.

1. If you need to edit the request itself, click the Edit hyperlink here and fix the fields as needed. An example would be when Vendor Registry asks for a vendor number, location name, or anything having to do with the original vendor information. SAVE your changes. The information just keyed in will populate the Vendor List shown above.
2. Or you may need to attach a missing document, especially if it involves a 1099 question. Select the appropriate vendor from the dropdown fox of 'Vendor Name,' then find your file using the Browse feature. The File Description is optional. Click the Add Attachment icon.
3. Or send a fax as requested.
4. When you have completed the requested task, click Submit Request to resubmit the request to Vendor Registry.
5. You will receive another email once the request has been completed by Vendor Registry.

Search Requests

The search request page is available to both Vendor Registry and the end users.


Search Requests

Search Criteria

Requester Name: First Last

Request Number: Purchase Order Number:

Vendor Name: Vendor Number:

Request Type: Vendor 1099 Purchasing Other

Location Title: Requests With Attachments Only:

Status:

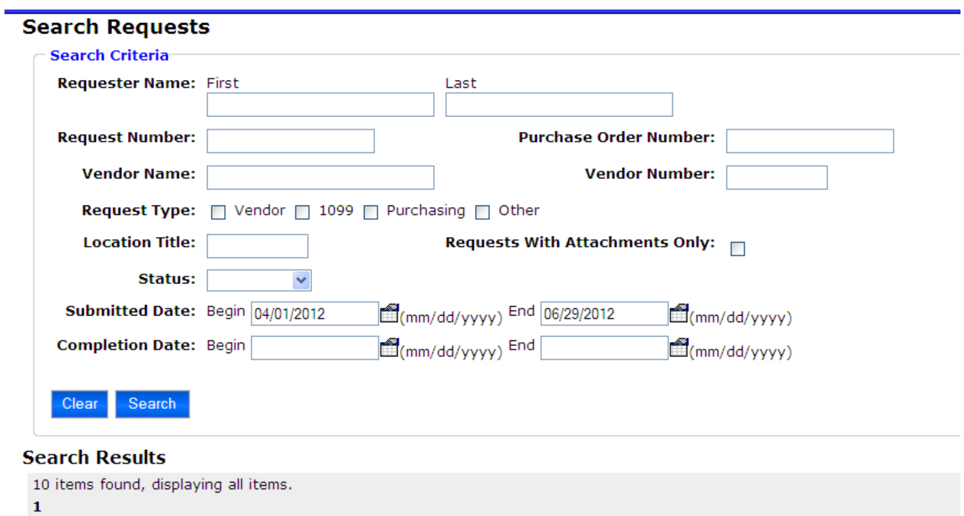
Requested Date: Begin (mm/dd/yyyy) End (mm/dd/yyyy)

Completion Date: Begin (mm/dd/yyyy) End (mm/dd/yyyy)

Clear Search

Return

This provides numerous ways to search for a vendor or a request. See the example below:


Search Requests

Search Criteria

Requester Name: First Last

Request Number: Purchase Order Number:

Vendor Name: Vendor Number:

Request Type: Vendor 1099 Purchasing Other

Location Title: Requests With Attachments Only:

Status:

Submitted Date: Begin 04/01/2012 (mm/dd/yyyy) End 06/29/2012 (mm/dd/yyyy)

Completion Date: Begin (mm/dd/yyyy) End (mm/dd/yyyy)

Clear Search

Search Results

10 items found, displaying all items.

1

Vendor Name	Request #	Request Type	Requester Name	Agency	Status	Submitted Date	Assigned To	Action
abc plumbing	28024	Vendor	Kerry Bailey	Dept. of Human Services	Completed	04/13/2012 13:09	Renee Walery	View
Kim Smith	28187	Vendor	Jerome Ekstrom	Dept. of Human Services	In Progress	04/02/2012 11:50	Renee Walery	View
+	28188	Vendor	James Bond	Dept. of Human Services	Returned	04/19/2012 10:32		View
Samantha Jones	28208	Vendor	Jerome Ekstrom	Dept. of Human Services	In Progress	05/03/2012 08:28	Renee Walery	View
Testing Review Screens	28228	Vendor	Jerome Ekstrom	Dept. of Human Services	Submitted	05/09/2012 15:22		View
Minnie Mouse	28229	Vendor	Jerome Ekstrom	Dept. of Human Services	In Progress	05/11/2012 14:33	Renee Walery	View
Daffy Duck, from disney channel	28249	Vendor	Jerome Ekstrom	Dept. of Human Services	Submitted	05/29/2012 11:44		View
Porky Pig	28268	Vendor	Jerome Ekstrom	Dept. of Human Services	In Progress	06/21/2012 15:46	Renee Walery	View

By entering a date range of submitted requests, you can see all requests sent to Vendor Registry for your entire agency. This screen was written this way so a user can see if someone else from their agency requested the same vendor. This screen will tell you at a glance the vendor name and the status of the request. If you see a plus sign like this, it means that the request contains multiple vendors. Click on the plus sign to see a drop-down list of vendors that were requested.

This page will also allow you to download your results in CSV or Excel or XML.

Request #	Request Type	Requester Name	Agency	Status	Requested Date	Priority	Assigned To	Action
27702	Vendor	Kerry Bailey	Dept. of Human Services	Completed	09/16/2011 10:13		Renee Walery	View

Export options: CSV | Excel | XML

If you click the View link, you will be able to see more details on each vendor, such as the attachments or the Status History.

Vendors (1)

Name	Number	Location Title	Type	Status	Priority	Withholding Code	Comments	Action
ATTACHMENT TESTING	258654		Regular	New		NA - Not Applicable	Please add this vendor	Print FileNet Header Page

Attachments (1)

File	Description	Date/Time Uploaded	Size
HO - IRS Codes versus Business Types.doc		09/16/2011 12:00	30720.0

Status History

Status	Date/Time	By
Completed	09/16/2011 10:37	Renee Walery
In Progress	09/16/2011 10:14	Renee Walery
Draft	09/16/2011 10:13	Kerry Bailey
Submitted	09/16/2011 10:13	Kerry Bailey

Comments to Requester